

FOR IMMEDIATE RELEASE



Media Contact:
Nicole Rideout, R\West
nicoler@rwest.com, 925-360-7892

**FINANCIAL ADVISORS NAMED TO BANK INVESTMENT CONSULTANT'S
2018 TOP 100 ADVISORS LIST**

ROCKLIN, CALIF. – January 24, 2019 – Raymond James Financial Services, Inc. and Addison Avenue Investment Services, the investment services division of [First Tech Federal Credit Union](#), are pleased to announce that financial advisors Michael Lipkins (#38), Michael Cooney (#13), Brett Everhart (#57), and Laura Pedroncelli (#19) have been named to Bank Investment Consultant's (BIC's) prestigious Top 100 Advisors list, revealed on December 7.

BIC's Top 100 Advisor ranking is an honor that recognizes all-around achievement. To compile the list, multiple variables are factored into one composite score, including production, percentage change in AUM and production, the amount of fee business from the most recent production figures and other attributes.*

BIC is the dedicated resource for bank-based financial advisors and wealth managers, and serves the needs of these professionals by providing deep resources and an authoritative perspective.

"All of the Financial Advisors at Addison Avenue work diligently to help their clients develop individual, tailored, comprehensive financial plans," Addison Avenue Investment Services President and Investment Executive, Scott Jenner said. "We are so proud of their achievements and congratulate them on their national recognition."

The complete list of the 2018 Top 100 Advisors can be found [here](#).

*Factors in the BIC Top 100 ranking include: AUM, production, percentage change in AUM and production, the amount of fee business from the most recent production figures and the ratio of production per AUM.

About Addison Avenue Investment Services

Addison Avenue Investment Services was initially launched in 1998 to serve the investment needs of Hewlett-Packard employees. The team at Addison Avenue Investment Services has helped make their credit union investment program the largest in the nation*, with Raymond James Financial Advisors managing more than \$3.7 billion in assets for First Tech's 488,000 members. There are 31 advisors operating in 42 First Tech branches across eight states.

Kehrer Bielan Research & Consulting, 2017

Financial Advisors offer securities through **Raymond James Financial Services, Inc.** Member [FINRA/SIPC](#) and securities are not insured by credit union insurance, the NCUA or any other government agency, are not deposits or obligations of the credit union, are not guaranteed by the credit union, and are subject to risks, including the possible loss of principal. First Tech Federal Credit Union and Addison Avenue Investment Services are not registered broker/dealers and are independent of Raymond James Financial Services. Investment advisory services offered through Raymond James Financial Services Advisors. Raymond James is not affiliated with Kehrer Bielan Research & Consulting.

To compile the list, multiple variables were combined into one composite score. The six categories used are: (1) assets under management; (2) trailing-12 month production; (3) percentage increase in AUM from the previous year; (4) percentage increase in T-12 production; (5) amount of fee business; and (6) the ratio of production-per-AUM. (Note: 2015 AUM was defined as the amount an advisor had as of Aug. 31, 2016. Likewise, for T-12 production, the 12-month period ending Aug. 31, 2016 was used.) The nominees were ranked by each of the six categories and then six different scores were calculated based on where they ranked. Those six scores were used to compile the final list. The ranking may not be representative of any one client's experience, is not an endorsement, and is not indicative of advisor's future performance. Neither Raymond James nor any of its Financial Advisors pay a fee in exchange for this award/rating. BIC is not affiliated with Raymond James.

Registered address: 1011 Sunset Blvd, Rocklin, CA 95765 | 855.744.8585

About First Tech Federal Credit Union

First Tech Federal Credit Union is a \$12+ billion institution headquartered in San Jose, California. It is the nation's premier credit union serving the world's leading technology oriented companies and their employees, including HP Inc., Hewlett Packard Enterprise, Microsoft, Agilent, Intel, Cisco, Amazon, Nike, Intuit, Google, and more. First Tech is recognized as the industry catalyst for delivering effortless banking experiences to more than 520,000 members through its 42 branch locations, more than 5,600 CO-OP Shared Branch locations, 30,000 CO-OP Network ATMs, and online platforms. First Tech offers a full range of financial services, including traditional banking, online banking, mortgages, financial planning, various consumer loans, and insurance services. Federally insured by NCUA. Equal Housing Lender. For more information, visit www.firsttechfed.com.

###